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SOARing to Employment with SSA Work Incentives and Benefits Planning

Presented by the Substance Abuse and Mental Health
Services Administration (SAMHSA)
SOAR Technical Assistance (TA) Center
U.S. Department of Health and Human Services

October 29, 2020



SAMHSA
Substance Abuse and Mental Health
Services Administration

Disclaimer

The views, opinions, and content expressed in this presentation do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).

Webinar Instructions

- Muting
- Recording availability
- Downloading documents
- Questions and Answers

Purpose and Objectives

SOAR WORKS
SSI/SSDI Outreach, Access, and Recovery

SAMHSA
Substance Abuse and Mental Health Services Administration

October 2020

SOAR and Employment for SSI/SSDI Beneficiaries

Jen Elder, M.Sc.

Introduction

Individuals who have disabling conditions and receive cash and other benefits through the Social Security Administration's (SSA) Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) programs are eligible for employment supports to assist them in obtaining and maintaining employment. When SSI/SSDI benefits begin, lifelong employment goals do not end. In the spirit of SSI/SSDI Outreach, Access, and Recovery (SOAR) as a critical part of income supports for individuals who are experiencing or at risk of homelessness, people who receive SSI/SSDI are encouraged to seek employment and employment services throughout the application process and after benefits are obtained.

This issue brief describes:

- How to work while applying for SSI/SSDI benefits
- Misconceptions about employment and loss of disability benefits
- How earned income from employment affects SSI/SSDI benefits and Medicare/Medicaid coverage

• Employment resources and work incentives offered by SSA to current SSI/SSDI beneficiaries who want to find work or return to work

• The role SOAR programs can play in connecting individuals to employment resources

Getting the Facts Straight

Misinformation about working and retaining SSI/SSDI benefits can reduce the likelihood a person will attempt to return to work by creating unnecessary fear that they will lose their hard-won benefits. A significant majority of individuals with disabilities want to work.* Removing fears and barriers to employment can be a critical step in recovery.

Employment is about more than income. Additional benefits can include:

- An improved housing stability through increased income
- A defined role in the community
- Feelings of self-worth and self-confidence
- New friendships and connections to others
- Added structure to daily life

* Tina Marshall, Richard W. Goldberg, Lisa Braude, Richard H. Dougherty, Allen S. Daniels, Sushmita Shoma Ghose, Preethy George, and Miriam E. Delphin-Rittmon, "Supported Employment: Assessing the Evidence," *Psychiatric Services* 65, no. 1 (January 2014): 16-23. <https://doi.org/10.1176/appi.ps.201302062>.

| Myths and Facts About Working and Retaining SSI/SSDI Benefits |
|--|
| Myth #1: Benefits end immediately when you return to work. |
| Fact: Cash benefits do not end immediately. For how work affects SSI payments see pages 3-4, for SSDI see pages 4-6. |
| Myth #2: You can work only 20 hours per week while receiving disability benefits. |
| Fact: There is no limit to the number of hours you can work while receiving disability benefits. |
| Myth #3: Health insurance ends immediately when you return to work. |
| Fact: You can still be eligible for Medicaid and Medicare, see page 6-7. |
| Myth #4: If Social Security knows you are working they will say you aren't disabled anymore. |
| Fact: SSA suspends Continuing Disability Reviews while beneficiaries are using Ticket to Work and making progress towards employment goals, see page 2-3. |

- Learn about SSA work incentives and benefits planning
- Share key strategies and resources for accessing SSA work incentives and benefits planning in the community
- Learn from a SOAR beneficiary who has utilized SSA work incentives and benefits planning

Agenda

Presenters

- John E. Marshall, Area Work Incentives Coordinator, SOAR/Homeless Coordinator, Social Security Administration, Chicago, Illinois
- Lucy Axton Miller, Technical Assistance Liaison, Virginia Commonwealth University's National Training Center, Richmond, Virginia
- Byron J. Kish, Esq., Director of Disability Benefits and SOAR State Lead, Easter Seals, Lakewood, Colorado
- Pablo Sandoval, MS, Senior Director of Employment Services, Easter Seals, Lakewood, Colorado
- Justin L., SOAR Beneficiary, Easter Seals, Lakewood, Colorado

Questions and Answers

- Facilitated by the SAMHSA SOAR TA Center

Welcome!

Asha Stanly, MSW, LICSW
Government Project Officer
Division of State and Community Systems Development
Center for Mental Health Services
Substance Abuse and Mental Health Services Administration

October 29, 2020



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Facts: Achieve Employment Equity for People with Disabilities!

- People with serious mental illness (SMI) are employed at much lower rates than the general population (approximately 1 in 10)
- Systems have long operated under the incorrect assumption that people with SMI can't work, but studies have consistently found this to be untrue
- Two-thirds want to work and many have worked before
- People with disabling conditions are capable of working when they receive appropriate supports

Working for More than Income

- Self-worth and self-confidence
- Define a role for the person in the community
- Foster a connection to others
- Add structure to daily life
- Critical step in recovery

Using SOAR as a Myth-buster

| Myths | Facts! |
|---|---|
| If you work, your SSI/SSDI application will be automatically denied | Nope! Applicants can work and earn up to \$1,260/month (2020) and still be eligible |
| Benefits and health insurance end immediately when you start working | No way! SSA has amazing work incentives to help applicants keep cash and health benefits |
| You can only work part-time while receiving disability | No sir-ee! There is no limit to the amount of hours you can work and receive disability |
| If Social Security knows you are working, they will say you aren't disabled anymore | Nay! SSA suspends Continuing Disability Reviews while beneficiaries use Ticket to Work and make progress towards employment goals |

Yes, You Can Work!

- SOAR resource designed to bust myths and promote employment
- One-page fact sheet to share with program participants



SOAR WORKS

YES, YOU CAN WORK!

Interested in returning to work or trying out work for the first time, but unsure how work will impact your Social Security benefits or if work is even possible for you?

Many people receiving disability benefits, or applying for benefits, really want to work, but fear the consequences. This handout will give you the information you and your family need to learn more about programs, which will assist you with returning to work, or trying out work for the first time!

We can help you find success! These recommended resources provide information on where you can go for assistance to learn more about employment for people with disabilities. Quality services are available to help you better understand all of the federal work incentive programs, including Social Security work supports, for people with disabilities.

MYTHS WE'VE HEARD ON THE STREETS AND FACTS TO BUST THEM UP!

| | |
|--|--|
| MYTH "People with mental illness shouldn't work." | FACT People with mental health conditions are just as productive as other employees. Employers who hire people with mental health conditions report good attendance and punctuality as well as motivation, good work, and job tenure on par with or greater than other employees. |
| MYTH "I will lose my disability benefits, income and health insurance, which I have worked so hard to obtain!" | FACT Not so fast! SSA offers comprehensive work incentives which allows you to keep your benefits for quite a long time. Should you be unable to continue working as a result of your disability, SSA may restart your benefits. Because some SSA rules may be hard to understand, all states have benefit planning resources to help you get started. https://www.ssa.gov/redbook/ |
| MYTH "I have never worked before, so I have no skills an employer needs." | FACT People with disabilities with little or no work history do find work that meets their strengths, preferences, abilities, and skills. Supported employment services focus on these factors to help you seek and find competitive employment in the community. |

SSA Work Incentives for People Receiving SSI and SSDI

John E. Marshall
Area Work Incentives Coordinator
SOAR and Homeless Coordinator
Social Security Administration
Chicago, Illinois

October 29, 2020



SAMHSA
Substance Abuse and Mental Health
Services Administration

What are Work Incentives?

- Employment support provisions that assist beneficiaries in moving from benefit dependency to independence
- Designed to help beneficiaries enter, re-enter, or stay in the workforce by protecting their eligibility for cash payments and/or health care

Both SSDI and SSI Eligible Employment Supports

Contents:

- Subsidies and Special Conditions
- Unsuccessful Work Attempt (UWA)
- Impairment-Related Work Expenses (IRWE)
- Plan to Achieve Self-Support (PASS)
- Expedited Reinstatement (EXR)
- Ticket to Work (TTW)

SSA Form SSA-821 (Work Activity Report)

- SSA-821 is used to document work activity and work incentives when SSA is making SGA decisions.

- Beneficiaries complete this form to document special conditions, subsidies, and IRWEs so decisions are based on the real value of the work.

| Yes | Special Condition | Employer Name | Date (MM/YYYY to MM/YYYY) | Please Describe |
|--------------------------|--|---------------|---------------------------------|-----------------|
| <input type="checkbox"/> | Had extra help, extra supervision or a job coach | | | |
| <input type="checkbox"/> | Worked irregular or fewer hours than other workers | | | |
| <input type="checkbox"/> | Given special equipment because of my condition | | | |
| <input type="checkbox"/> | Took more rest periods than other workers | | | |
| <input type="checkbox"/> | Given special transportation to and from work | | | |

Do or did you spend any of your own money for items or services related to your physical and/or mental condition(s) that you needed in order to work and for which you did not get reimbursed? (For example: medicines or co-pays, medical devices or procedures, Braille equipment, special telephone or equipment, service animal, attendant care, modifications to car used for work, or other special transportation.) We may ask you for proof of payment.

NO. I did not spend any of my own money for items or services related to my physical and/or mental condition.

YES. Please tell us what you paid below. Do not show any expenses that have been or will be paid by an insurance company, other organization, or other person.

| Describe Item or Service | Cost | Date Paid (MM/YYYY-MM/YYYY) |
|--------------------------------|--|--------------------------------|
| Example: <i>Service animal</i> | <i>\$100 per day, week, month, or year</i> | <i>01/2000 - 02/2000</i> |
| | \$ _____ per _____ | |

Subsidies and Special Conditions

What is a subsidy?

- A “subsidy” is support provided by your employer that may result in you receiving more pay than the actual value of the services you perform.

What are special conditions?

- “Special conditions” refer to support and on-the-job assistance provided by your employer, or by someone *other than your employer*, for example, a vocational rehabilitation agency. Because of this support, you may receive more pay than the actual value of the services you perform.

Unsuccessful Work Attempt (UWA)

- An Unsuccessful Work Attempt (UWA) is an effort to do work, in employment or self-employment, which you stopped or reduced to below the SGA level after a short time (within 6 months) because of:
 - your impairment, or
 - removal of special conditions related to your impairment that you needed to help you work.

Impairment-Related Work Expenses (IRWE)

- We deduct the cost of certain impairment-related items and services that are needed to work from gross earnings when we decide if your work is SGA.
- Example:
- Beneficiary is earning \$1200.00 per month in gross wages. His monthly co-pay for his medications is \$75.00.
- $\$1200 - \$75 = \$1125$ - This is countable income when determining SGA.

Plan to Achieve Self-Support (PASS)

What is a PASS?

- A PASS is an SSI provision to help individuals with disabilities return to work.
- If you receive SSI or could qualify for SSI after setting aside income or resources so that you may pursue a work goal, you could benefit from a PASS.

How does a PASS help someone return to work?

- We base SSI eligibility and payment amounts on income and resources.
- A PASS lets a disabled individual set aside money and things he/she owns to pay for items or services needed to achieve a specific work goal.
- The objective of a PASS is to help disabled individuals find employment that reduces or eliminates SSI or SSDI benefits.

Plan to Achieve Self-Support (PASS)

What kinds of expenses can a PASS help pay for?

- School or training expenses - tuition, fees, books, and supplies
- Uniforms, special clothing, safety equipment, tools
- Attendant care or child care expenses
- Transportation for work
- Employment services such as a job coach
- Supplies to start a business

Expedited Reinstatement of Benefits (EXR)

What is EXR?

EXR is your safety net if your cash benefits end because of your work. If you make less money or you have to stop working because of your disability, we may be able to restart your benefits right away if:

- you stop working above the SGA level, and
- your disability is the same as or related to your current disability, and
- you make your request within 5 years of when your benefits end.

How does EXR help you?

- The EXR provision allows you to receive up to 6 months of temporary cash benefits while we conduct a medical review to decide if we can reinstate your benefits. You may also be eligible for Medicare and/or Medicaid during this provisional benefit period.

Ticket to Work (TTW)

- TTW is an innovative program for persons with disabilities who want to work and participate in planning their employment.
- It increases your available choices when obtaining employment services, vocational rehabilitation (VR) services, and other support services you may need to get or keep a job.
- It is a free and voluntary service.
- You can use the Ticket if you choose, but there is no penalty for not using it.

Ticket to Work (TTW)

- For more information on the TTW Program, including a list of approved **Employment Networks (ENs)**, call:
- 1-866-YOURTICKET (1-866-968-7842)
- OR
- TTY 1-866-833-2967
- between 8 a.m. to 8 p.m. Eastern time Monday through Friday.
- [socialsecurity.gov/work](https://www.socialsecurity.gov/work)

SSDI Only Employment Supports

Contents:

- Trial Work Period (TWP)
- Extended Period of Eligibility (EPE)
- Continuation of Medicare Coverage
- Medicare for Persons with Disabilities Who Work

Trial Work Period (TWP)

- Allows SSDI beneficiaries time to test their ability to work
- 9 Months, not necessarily consecutive
- “Rolling” 60-month period
- Full SSDI benefit continues regardless of earnings
- Months with \$910 in gross earnings (2020) or more than 80 hours of self employment are considered TWP months.
- Cannot begin before the month of entitlement or the month of filing, whichever is later

Trial Work Period (TWP)

- You are not eligible for disability benefits or a TWP if you work at the SGA level within 12 months of the start of your impairment(s) and before we approve your claim for disability benefits.
- It is possible for your benefits to stop due to your medical recovery before the end of your TWP.
- We do not apply work incentive rules when determining the service months in your TWP.

Extended Period of Eligibility (EPE)

- The EPE begins the month after the Trial Work Period (TWP) ends, even if you are not working that month.
- The first 36 months of the EPE is the re-entitlement period.
- During the re-entitlement period:
 - if work or monthly earnings are below SGA, benefits are payable;
 - if work or monthly earnings are above SGA, benefits are suspended.
- EPE ends with the later of:
 - the month before the first month of SGA earnings after the re-entitlement period, or
 - the second month after the month of disability cessation due to SGA.

Extended Period of Eligibility (EPE)

- Cessation Month and Grace Period:
- Cessation Month - the first month work or monthly earnings exceed SGA after the end of the TWP
- Grace Period - the two months immediately following the cessation month
- NOTE: Benefits are paid for the cessation month and the grace period, whether or not the beneficiary is earning over SGA.

Continuation of Medicare Coverage

- Although cash benefits may cease due to work, continued health insurance is possible.
- Most beneficiaries who work will continue to receive at least 93 consecutive months of Part A; Part B (if enrolled); and Part D (if enrolled). There is no premium for Part A.
- The 93 months start the month after the last month of the TWP.
- To qualify, beneficiary must already have Medicare and be working at SGA level but not medically improved.

Medicare for Persons with Disabilities Who Work

- After premium-free Medicare coverage ends due to work, a disabled individual may buy continued Medicare coverage as long as he/she remains medically disabled.
- To qualify, the individual:
 - must be under age 65, and
 - continue to have a disabling impairment, and
 - Medicare must have stopped due to work.
- Hospital Insurance (Part A) is available for \$458.00 per month in 2020. Supplemental Medical Insurance (Part B) is available for \$144.60 per month in 2020.

SSI Only Employment Supports

Contents:

- Earned Income Exclusion
- Student Earned Income Exclusion (SEIE)
- Special SSI Payments for Persons Who Work - Section 1619(a)
- Medicaid While Working - Section 1619(b)

Earned Income Exclusion

- SSA does not count the first \$65 of the earnings received in a month, plus one-half of the remaining earnings. This means we count less than one-half of earnings when we figure the SSI payment amount.
- We apply this exclusion in addition to the \$20 general income exclusion.
- We apply the \$20 general income exclusion first to any unearned income received.

Student Earned Income Exclusion (SEIE)

- If you are under age 22 and regularly attending school, we do not count up to \$1,900 of your earned income per month when we figure the SSI payment amount. The maximum yearly exclusion for 2020 is \$7,670.
- “Regularly Attending School” means:
 - in a college or university for at least 8 hours a week, or
 - in grades 7-12 for at least 12 hours a week, or
 - in a training course to prepare for employment for at least 12 hours a week (15 hours a week if the course involves shop practice), or
 - for less time than indicated above for reasons beyond the student’s control, such as illness, or
 - home schooling, if instructed in grades 7-12 for at least 12 hours a week.

Property Essential to Self-Support (PESS)

- How Does PESS help you?
- We do not count some resources that are essential to your means of self-support when we decide your continuing eligibility for Supplemental Security Income (SSI).

Special SSI Payments for Persons Who Work - Section 1619(a)

- You can receive SSI cash payments even when earned income is at the Substantial Gainful Activity (SGA) level. This provision eliminates the need for the trial work period or extended period of eligibility under SSI.
- To qualify, you must:
 - have been eligible for an SSI payment for at least 1 month before working at the SGA level, and
 - still be disabled, and
 - meet all other eligibility rules, including income and resource tests.
- Under 1619(a), a beneficiary can receive their gross income from wages, an SSI payment (calculated based on wages) and Medicaid.

Medicaid While Working – Section 1619(b)

- How does it work?
- Your eligibility for SSI will continue for as long as you meet the basic eligibility requirements and the income and resource tests.
- We will continue to figure your SSI payment amount in the same way as before.
- If your state provides Medicaid to persons on SSI, you will continue to be eligible for Medicaid. Each state has a Medicaid threshold.
- Do you need to apply?
- You do not need to file a special application; just keep us up to date on your work activity.

Medicaid While Working – Section 1619(b)

- After you return to work, Medicaid coverage can continue, even if your earnings become too high for an SSI cash payment.
- To qualify, a beneficiary must meet ALL of the following:
 - was eligible for an SSI cash payment for at least 1 month
 - would be eligible for cash payment except for earnings
 - still be disabled
 - meet all other eligibility rules, including the resources test
 - need Medicaid in order to work
 - have gross earned income that is insufficient to replace SSI, Medicaid, and any publicly funded attendant care
- Under 1619(b), a beneficiary will receive income from gross wages and Medicaid but no SSI payment.

Reinstating SSI Eligibility Without a New Application

How does it help you?

- If you have been ineligible for Supplemental Security Income (SSI) payments due to your work, you may be able to restart your SSI cash payments again at any time without a new application.
- If you have been ineligible for SSI and/or Medicaid for any reason other than work or medical recovery, you may be able to restart your SSI cash payment and/or Medicaid coverage within 12 months without a new application.
- When your situation changes, contact us and ask about how you can restart your SSI benefits and/or Medicaid.

Responsibilities When Beneficiary Returns to Work

- Notify Social Security of any changes in work activity:
 - Start or stop work;
 - Work has been reported but duties, hours, or pay have changed;
 - Start paying for expenses that are needed to work due to the disability.
- Report changes in work activity by phone, fax, mail or in person.
- Call 1-800-772-1213 between 7 a.m. and 7 p.m. Monday-Friday.

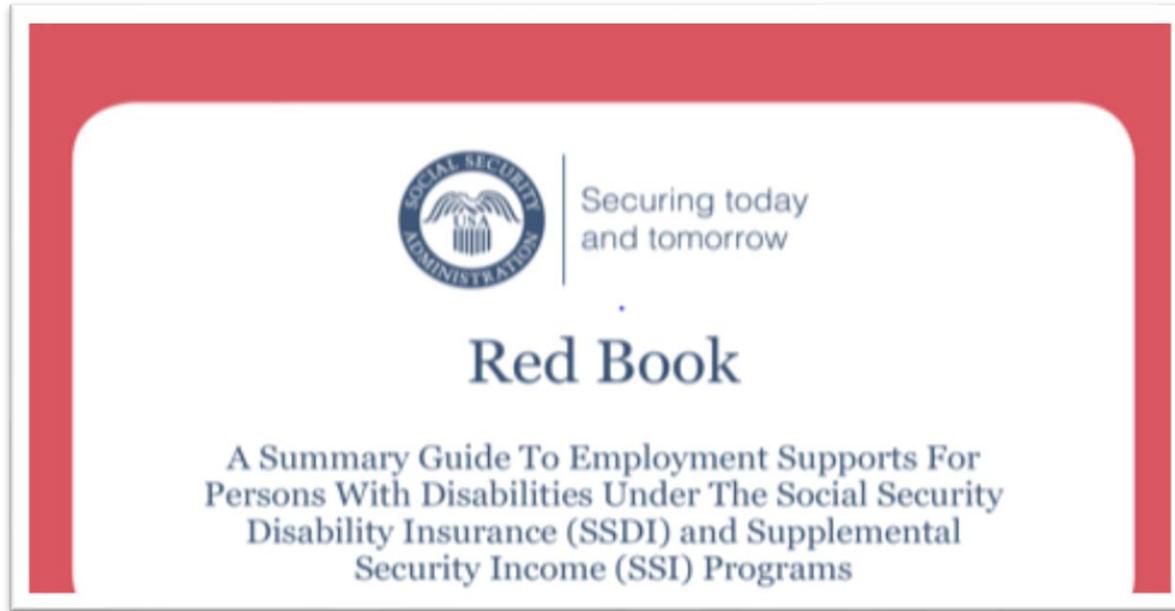
Wage Reporting

For SSDI and SSI recipients, you can report wages through:

- your personal *my Social Security* account;
- visiting/calling a field office;
- mailing/faxing the information; or
- calling the TeleService Center.

Note: SSI recipients can also report wages via the mobile wage reporting application and the telephone wage reporting service.

The Best Guide to Work



The Red Book is available at:

<https://www.ssa.gov/redbook/>

Employment Resources Available in the Community

Lucy Axton Miller
Technical Assistance Liaison
Virginia Commonwealth University's National Training Center
Richmond, Virginia

October 29, 2020



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What is WIPA?

- Acronym for **Work Incentives Planning and Assistance.**
- Provides individualized, in-depth, **employment focused** benefits counseling and work incentives planning to Social Security disability beneficiaries in all 50 states and US territories.
- Funded primarily by the Social Security Administration (SSA).
- Critical component of national effort to improve employment outcomes for Social Security disability beneficiaries.

Who is eligible for WIPA Services?

- Disabled (or blind) per Social Security's definition;
- Already receiving Social Security benefits based on disability or blindness (SSI or a Title II disability benefit such as SSDI, CDB or DWB); and
- At least age 14, but not yet full retirement age.

WIPA Priorities

Priority Group 1: Individuals who are currently working or engaging in self-employment and have both a need for and interest in receiving individualized work incentives planning and assistance services.

Priority Group 2: Beneficiaries who are actively pursuing employment or self-employment and who are interested in receiving work-related benefits counseling. This group includes:

- Beneficiaries with a clear employment goal who are conducting an active and regular job search; and
- Beneficiaries with a clear employment goal who have taken active steps to prepare for achieving that goal.

How WIPA Services Help Beneficiaries

WIPA Community Work Incentive Coordinators (CWICs) can help:

- Verify all benefits information.
- Identify and connect with services or supports needed to overcome barriers to employment.
- Understand how paid employment will affect all federal/state/local benefits.
- Identify, use, and manage Social Security work incentives.

- Support beneficiaries with reporting wage information to Social Security.
- Help beneficiaries to successfully manage benefits over time.
- Analyze healthcare coverage options so that beneficiaries can determine which options offer the best coverage at the most affordable price.
- Resolve benefits problems.

Limits to WIPA Services

- SSA does not allow CWICs to serve individuals in application status.
- SSA prohibits CWICs from representing beneficiaries during the appeals process.
- WIPA counseling is focused on the affect of **WORK** on benefits.

How does a beneficiary request WIPA services?

- Call the Ticket to Work Helpline at 1-866-968-7842 and ask for benefits counseling services.
- The Call Center Agent (CSR) will screen the caller to see if he/she meets WIPA eligibility requirements and priorities.
- Eligible high priority callers will be referred directly to the WIPA project by the CSR.

What other services can the TTW Helpline provide?

- Provide information about the TTW program.
- Provide information about Employment Networks.
- Answer questions about a beneficiary's ticket status.
- Provide information and referral services to meet callers' needs.

Synergy: SOAR and Employment Supports

Byron J. Kish, Esq.

Colorado SOAR State Team Lead
Director of Disability Benefits Services



Benefits Counseling and Employment Services at Easterseals Colorado



Disability Benefits Services (DBS)

Solving the Puzzle!

- SOAR Advocacy
- Benefits Counseling
- Employment Services: IPS Supported Employment and Customized Employment

Tools for Recovery...provided in one setting!

Goal: Financial Stability and Independence

- Talk about work early and often
 - Encourage employment and explain why and how it helps
- Use the *SSA- 821: Work Activity Report* and opinion letters from employers to prove disability
- Post-decision: Talk about work with your client and their team
 - Work is important regardless of whether client is approved or denied
- Connect the client to Benefits Counseling and other work supports
- Give the client options even if it's not with your organization

Work Activity Report: SGA and Countable Income

Employment (gross income)

- [Reducing Countable Income:](#)
 - Subsidies (SSA-3033) and Special Conditions
 - Impairment Related Work Expense (IRWE)
 - Blind Work Expense (BWE)
 - Income Averaging when applicable
- Ignoring Income:
 - [Unsuccessful Work Attempt](#) (UWA)

Self Employment (net income)

- [Three Tests:](#)
 - Sig. Serv. and Substantial Income (avg)
 - Comparability of Work
 - Worth of Work Activity
- [Reducing S.E. Countable Income:](#)
 - Unpaid Help
 - IRWE
 - Unincurred Business Expenses
 - Soil Bank Payments
 - Distributing Countable Income
- Unsuccessful Work Attempt (UWA)

Why Encourage Work?

No Harm to Client

1. SSA allows for earned income if less than SGA
2. SSA will evaluate SGA regardless of work activity

Good for Client

3. Work increases financial stability and independence
4. Work increases self-esteem, which can improve health
5. Work increases client's connection to their community
6. Work can decrease the use of drugs and alcohol

Good for the Case

7. Work can increase your credibility before SSA
8. Managers and coworkers can provide evidence to SSA

Benefits Counseling and Employment Services Easterseals Colorado

Pablo A. Sandoval, MS
Sr. Director of Employment Services
Certified IPS Trainer & Fidelity Reviewer
Community Partner Work Incentives Counselor (CPWIC)



Goal: Financial Stability and Independence

- Provides a clear, personalized plan (called a Benefits Summary and Analysis or BS&A) to address the fears and concerns many individuals and their families have about a reduction or loss of benefits if they work or make other life decisions.
- Includes analysis of an individual's current benefits, financial situation, and the affect different income levels from work will have on the individual's future financial situation.

Benefits Counseling Services

- Employment Specialists and Job Coaches are well versed in benefits and work incentives!
- Begins with a verification of benefits: Benefits Planning Query (BPQY)
 - Includes other Federal, State and Local Benefits, in Colorado = CBMS
- Provides assistance in understanding complicated benefits scenarios
 - How earnings or earning goals affect each benefit and how that ties into the full picture
- Includes wage reporting information
- Provides long term support, as needed
- Each beneficiary receives a “Benefits Portfolio” with a comprehensive BS&A, calculations sheets (SSI), TWP/EPE/EXR Tracking Sheets (SSDI) and/or other supporting documents.

Employment Services: IPS Supported Employment

Individual Placement and Support – Supported Employment/Education

- An Evidence-Based Model for Employment for individuals with Mental Illness
 - IPS Expansion: using the model with other disability groups/employment programs. This is the focus of ESC!
- Program model validated by rigorous research
- Has guidelines describing critical components: 8 Practice Principles

Definition of Supported Employment

- Mainstream jobs in a community; paying at least minimum wage; work setting includes individuals who are not disabled; intended for individuals with the **most severe disabilities**; ongoing support provided
- “Competitive Integrated Employment” (CIE)

Employment Services: Customized Employment

- Based on **discovery** of the applicant rather than on evaluation/comparative processes (non-labeling)
- Driven by a **customized plan** developed by the applicant's strengths, needs and interests
- Focuses on **tasks** rather than job titles to **negotiate essential responsibilities**
- Specific job duties are negotiated with employers, voluntarily, to customize the job
- Occurs in regular community workplaces or in self-owned businesses
- Involves pay of a least the minimum wage up to the prevailing wage

Meet Justin!

- Justin is 23-years old
- Received SOAR services through DBS
 - Approved for SSI in March 2018
- Participated in ESC's IPS Supported Employment Program
 - Direct Placement and Job Coaching at King Soopers Grocery
- Referred for Benefits Counseling
 - Full BS&A addressing SSI and associated work incentives, Medicaid, Medicaid Waivers, Medicaid Buy-In
 - Part-time employment (20 hours/week)



Let's talk to Justin

- Tell us about yourself
- How did you hear about DBS?
- Can you tell us about the assistance you received from Byron?
- What can you tell us about the employment services you received?
- Did you get a job?
- What's your current status?
- Tell us about the Benefits Counseling you received?
- What are your plans for the future?

Please type your questions into the Q&A box on the right of your screen

Final Thoughts: Start Talking about Work

- Begin the conversations early and have them often
- Remind the individual that it is their decision, let him/her weigh pros and cons
- Provide reassuring and encouraging messages
- Ensure the applicant is equipped with accurate information about working while applying for and receiving SSI/SSDI

Benefits planning is essential!

SOAR Employment Conversation Guide

Employment Conversation Guide: Sample Responses

Purpose of the Guide

- To begin conversations about work with SSI/SSDI beneficiaries and those applying for benefits.
- To ensure that the individual is receiving accurate information about employment and returning to work.
- To engage with an individual and determine their work goals.

| EMPLOYMENT CONVERSATION GUIDE | | |
|---|--|--|
| Name: | | |
| Let's talk about work. (Add facts/positive statements about work) | | |
| Questions to Ask | Responses | Case Manager Responses |
| How long have you been out of work? | I'm only 18 but have never worked, ever. I get day jobs now and then, under the table work. | That is often the case when we are working with younger people like you. It is positive that you are considering work now. You can add in extra money to supplement your benefits and consider other good things that come from working like making new friends. http://www.mentalhealthamerica.net/meaningful-work-and-recovery That is great! Are there types of day work you like more than others? Painting? Construction? Would you like to do more of that type of work, if it was steady? |

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| EMPLOYMENT CONVERSATION GUIDE | |
|--|-----------|
| Name: | |
| Let's talk about work. (Add facts/positive statements about work) | |
| Questions to Ask | Responses |
| Why do you want to work? ▪ What triggered your interest in work? | |
| What kind of work do you want to do? ▪ How did you decide on that type of job? | |
| What do you feel are benefits to working? | |
| How long have you been out of work? | |
| How has not working affected you emotionally, financially, socially? | |
| When you first began to think about work, did you talk to anyone about that? ▪ What did they say? | |
| What have other people told you about work? | |
| How do friends/family feel about you returning to work? | |

Future Integration Efforts

- Develop clear procedures for communication and referrals between SOAR and employment teams
- Implement a routine case conferencing system
 - In a recent SOAR and IPS (Individual Placement and Support) integration pilot, the sites who had the strongest outcomes reported developing close collaborations between SOAR and employment teams
- Increase opportunities for program participants to meet with both programs at intake

Resources

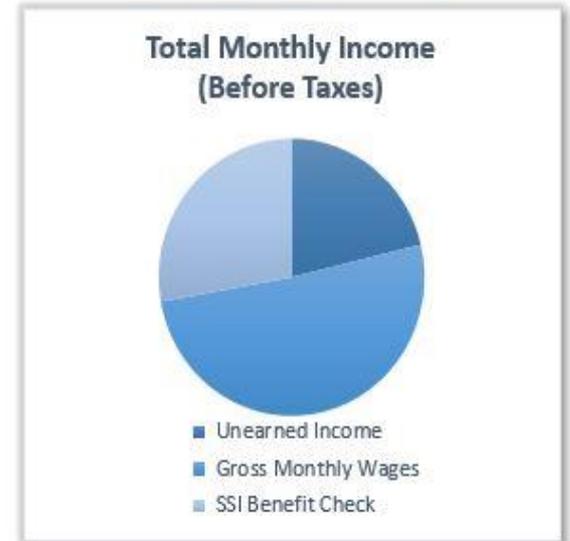
- SSA Work Site: <https://www.ssa.gov/work/>
 - Ticket to Work: Employment Networks
 - Work Incentives Planning and Assistance (WIPA) Program
 - Protection and Advocacy for Beneficiaries of Social Security (PABSS)
 - <https://choosework.ssa.gov/>
- Office of Disability Employment Policy
 - <https://www.dol.gov/odep/>
- Department of Labor, Career One-Stop
 - <https://www.careeronestop.org/>

Income and Benefits Calculator

- Created to serve Veterans, but useful for non-Veterans
- Intended to provide an estimate of how employment and work incentives affect the SSI cash benefit and overall income
- Easy to use, visual representation that helps to bust myths about employment and disability benefits

<https://soarworks.prainc.com/article/income-benefits-calculator>

| Total Monthly Income (Before Taxes) | |
|--|---------------------|
| \$250.00 | Unearned Income |
| \$600.00 | Gross Monthly Wages |
| \$327.50 | SSI Benefit Check |
| \$1,177.50 Total Gross Monthly Income | |



Things to Remember

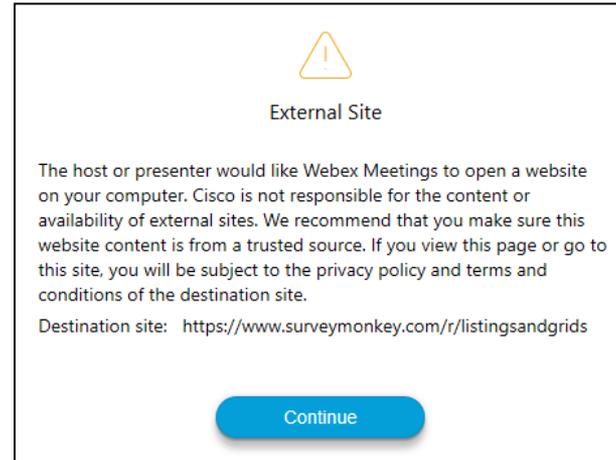
- Employment is possible! Help bust myths!
- Encourage work from the start
- Utilize Social Security work incentives
- Connect with work support programs
- Integrate services whenever possible
- Track and report all earnings to SSA
- Don't risk overpayment
- When in doubt, talk to your local SSA field office
- Use your resources!

Next Steps

- ✓ Familiarize yourself with the SOAR and Employment resources
- ✓ Develop a partnership with Your Local SSA Work Incentive Coordinator, WIPA, and Employment Networks
- ✓ Contact your SAMHSA SOAR TA Center Liaison with questions

Webinar Evaluation

- At the conclusion of the webinar you will be automatically re-directed to SurveyMonkey.
- You will receive this alert that you are leaving WebEx.
- Please click “Continue”!



Thank You

SAMHSA's mission is to reduce the impact of substance abuse and mental illness on America's communities.

<https://soarworks.prainc.com>

soar@prainc.com

www.samhsa.gov

1-877-SAMHSA-7 (1-877-726-4727) • 1-800-487-4889 (TDD)